

U.S. Department
of Transportation
**United States
Coast Guard**



INDUSTRIAL SUPPORT SERVICES

CUSTOMER MANUAL

COMDTINST M5240.11



COMDTINST M5240.11

COMMANDANT INSTRUCTION M5240.11

OCT 4 1993

Subj: INDUSTRIAL SUPPORT SERVICES CUSTOMER MANUAL

1. PURPOSE. This instruction provides information concerning policy and procedures for obtaining industrial support services from industrial support activities. It informs all Coast Guard units of the availability of industrial support services and the role of a industrial support activity within the Coast Guard support system.
2. ACTION. Area and district commanders, commanders of maintenance and logistics commands and commanding officers of headquarters units shall ensure compliance with the provisions of this instruction.
3. BACKGROUND. The Industrial Support Study was approved in May 1991. The Office of Engineering, Logistics and Development (G-E) has been tasked with implementing the study's approved recommendations. The study pointed out opportunities to improve the delivery of industrial support services. This instruction serves as a vehicle to provide all Coast Guard Commands with policy and procedures which define the contractual relationship between industrial support activities and its customers.
4. REPORTS AND FORMS. Supplies of the Industrial Service Order Form, Standard Form CG 3103 (Rev 7/93) may be requisitioned from Commandant G-ES-3 and will be included in the 31 Dec 93 revision to CG Standard Workstation Forms Plus Laser Software.

[Signature]
R. J. French
Chief, Office of Engineering, Logistics
and Development

DISTRIBUTION - SDL No. 131

	a	b	c	d	e	f	g	h	i	j	k	l	m	n	o	p	q	r	s	t	u	v	w	x	y	z
A	1	1	1		1	1	1	1	1	1	1	1	1	1	1	1	1	1	1		1	1				
B		2	*		1	3					1								1	3						
C				2		1	1	1	1	1	1						1	1			1	1	1	1		1
D	1			2																1				1	1	
E							1	1											1			1				
F				1		1					1		1													
G		1																								
H																										

* NON-STANDARD DISTRIBUTION: B:c District Offices (2), B:c MLC(s) (6)

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CHAPTER 1

MISSION

Contents

- A. Vision
 - B. Mission
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- A. Vision. We shall provide an effective and efficient industrial infrastructure within the CG to support Coast Guard operational missions. We shall provide our industrial personnel with opportunities for personal and professional growth in an environment of trust, integrity, equality and mutual respect. We shall support changing Coast Guard needs through continuous improvement, innovation, and technological growth now and into the 21st century.
- B. Mission. Coast Guard Industrial Support Activities provide a portion of the support needed to fulfill Coast Guard operational requirements and contingencies. The mission statement describes who Industrial Support Activities are, what they do, why they do it, and for whom they do it. It provides the focus from which all participants of the industrial delivery system direct their efforts. To remain responsive to the customer, Industrial Support Activities must continually focus on the mission when developing and executing business practices.

MISSION STATEMENT

Industrial Support Activities provide quality intermediate and depot level industrial services that are versatile, timely, environmentally safe, and responsive to units, Coast Guard wide.

We accomplish our mission by maintaining an in-house, core Industrial capability of engineering expertise, skilled tradespeople, equipment and facilities that are responsive to:

- ♦ Coast Guard military and domestic contingency mission needs as guided by Logistics Support and Mobilization Plans.
- ♦ Coast Guard peace time mission needs as defined by and coordinated with Maintenance and Logistics Commanders and District Commanders.

C. Definitions.

1. Industrial Support Activity (ISA). An ISA consists of the personnel, equipment, and facilities located at designated Support Centers, Groups, or Bases having responsibility for executing the Coast Guard's industrial mission. Not all Support Centers, Groups, and Bases have industrial missions.
2. Customers. The customers of ISAs are those Coast Guard units receiving industrial products and services which enable them to carry out their missions.
3. Partners. The partners of ISAs are those Coast Guard units and staff elements who are part of the process or have an interest in the delivery of Industrial products and services to Industrial customers.

D. Industrial Support Activities (ISAs). ISAs are located at the following commands:

Support Center Alameda, CA
Support Center Boston, MA
Support Center New Orleans, LA
Support Center New York, NY
Support Center Portsmouth, VA
Support Center San Pedro, CA
Group Baltimore, MD
Group Woods Hole, MA
Base Charleston, SC
Base Detroit, MI
Base Ft. Macon, NC
Base Honolulu, HI
Base Ketchikan, AK
Base Mayport, FL
Base Miami, FL
Base Milwaukee, WI
Base Mobile, AL
Base St. Louis, MO
Base South Portland, ME
Base San Juan, PR
Base Saute Ste Marie, MI
Base Southwest Harbor, ME

CHAPTER 2

REQUESTING SERVICES

Contents

- A. Access to Industrial Support Activities
 - B. Industrial Service Order Funding Requirements and Restrictions
 - C. Industrial Service Order Process
 - D. Industrial Service Order Form
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A. Access to Industrial Support Activities.

1. Industrial Support Activity (ISA) Availability. Industrial Support Activities (ISAs) are available to provide intermediate and depot level services to Coast Guard Units. A standard process has been established for requesting industrial services to simplify and increase customer access to ISAs.
2. Requesting Industrial Services.
 - a. Any Coast Guard unit or staff, with available funds and authority for obligating government funds, can request services from an ISA. By issuing an Industrial Service Order (ISO)(CG Form 3103), a customer commits its funds for services to be rendered by an ISA. This is much the same as committing funds in any commercial procurement. For work to be accomplished, the customer and the ISA must reach a mutually agreeable and acceptable service order to accomplish that work. When agreement is attained the committed funds are obligated.
 - b. In emergency situations, a CASREP, E-Mail, or phone conversation will be enough to initiate response from an ISA. In these instances, funding for the initial request is on a "not to exceed" basis, with the ISA being reimbursed by the customer. The ISA will take the information provided and generate an ISO. The ISO is used to document the authority to proceed with emergency services and is signed by the customer as soon as the situation allows. The customer must state in the emergency request that: funds are available, the ISA has authorization to proceed, and the operational commander deems the services be completed quickly. Telephonic or E-mail request shall be documented with a

CASREP or Message Request. Section F., Examples, of this chapter includes CASREP and Message Request examples.

- A. 2. c. Responsibilities. Both the customer and the ISA have responsibilities, some distinct, some shared. Teamwork is fundamental and critical. The customer must establish the need for the work, clearly identify the requirements, and properly fund the work. The ISA's focus is on the needs of the customer. The ISA must provide its customers with high quality work that is delivered on time and within budget. The ISA also has a responsibility to keep customers informed of the true status of its projects. Customers and the ISA must focus on the proper and effective execution of each individual process involved: ISO initiation, preparation of ISOs, cost estimating, ISO acceptance procedures, ISO start-up, ISO status reporting, ISO amendment procedures, ISO close-out, and workload projections.
- d. Bona Fide Need. The bona fide need rule states that a fiscal year's appropriation may be obligated only to meet a legitimate, or bona fide, need arising in or in some cases arising prior to, but continuing to exist in the fiscal year for which the appropriation was made. The Industrial Manager can assist in making these determinations. This rule does allow for full initial funding for work which is for a single end product to start in one fiscal year and extend into a subsequent fiscal year (see "constructive start, paragraph A.2.f). However, it does not allow for a small amount of work to be started in one fiscal year for the sole purpose of protecting funds that are expiring at the end of the fiscal year. The bona fide need rule applies to multiple-year as well as single fiscal year appropriations.
- e. Obligation. Funds which accompany an ISO are transferred to the industrial AFC-38 account. AFC-38 is a revolving fund which finances ISOs. Funds are considered obligated once agreement is reached between the requisitioner and the ISA (when the ISO is approved by the Industrial Manager), provided a bona fide need exists and a constructive start is made in the fiscal year in which the funds are obligated.
- f. Constructive Start. When a Project Order (see paragraph B.2. for Project Order description) is funded by an appropriation that will expire at the end of the fiscal year and this Project Order will extend into the next fiscal year, a constructive start must be made in the fiscal year in which the funds are appropriated and obligated. In other words, the work must start before the fiscal year ends in order for it to be a valid

obligation. This requirement for constructive start is in addition to the limitation discussed under "bona fide needs."

- A. 2. g. Co-mingled Funds. ISO funds shall not be from different appropriations. Funds from different appropriations (e.g. OE and AC&I) must not be mixed on the same ISO. It may be acceptable to accomplish OE work during an AC&I project as long as the work accomplished is not part of the AC&I project. In all cases separate projects must be established for the work or else funds are considered co-mingled.
- B. Industrial Service Order Funding Requirements and Restrictions. ISOs fall into two types, Work Order and Project Order. The type determines the funding requirements/restrictions. The Industrial Manager is responsible to review the ISO and make a final determination on whether an ISO is a Work Order or a Project Order. The purpose of this review and final determination is to insure that ISO is being administered and financed in accordance with existing directives and procurement laws. The following guidelines apply in the determination of work orders and project orders.
 1. Work Order Description. A Work Order is a request for services from an ISA issued under the authority of 31 U.S.C. 1535 for work or services involving day-to-day operations of the benefiting unit. This work or service is usually of a general nature, performed incrementally over a specified period of time and will not exceed the end of the fiscal year in which the funds expire. Work Orders are similar to a "not to exceed time and materials" (T&M) contract placed with commercial contractors. They provide a medium for an ISA to expend material and travel in minor routine or emergency work which does not exceed certain locally established limits.

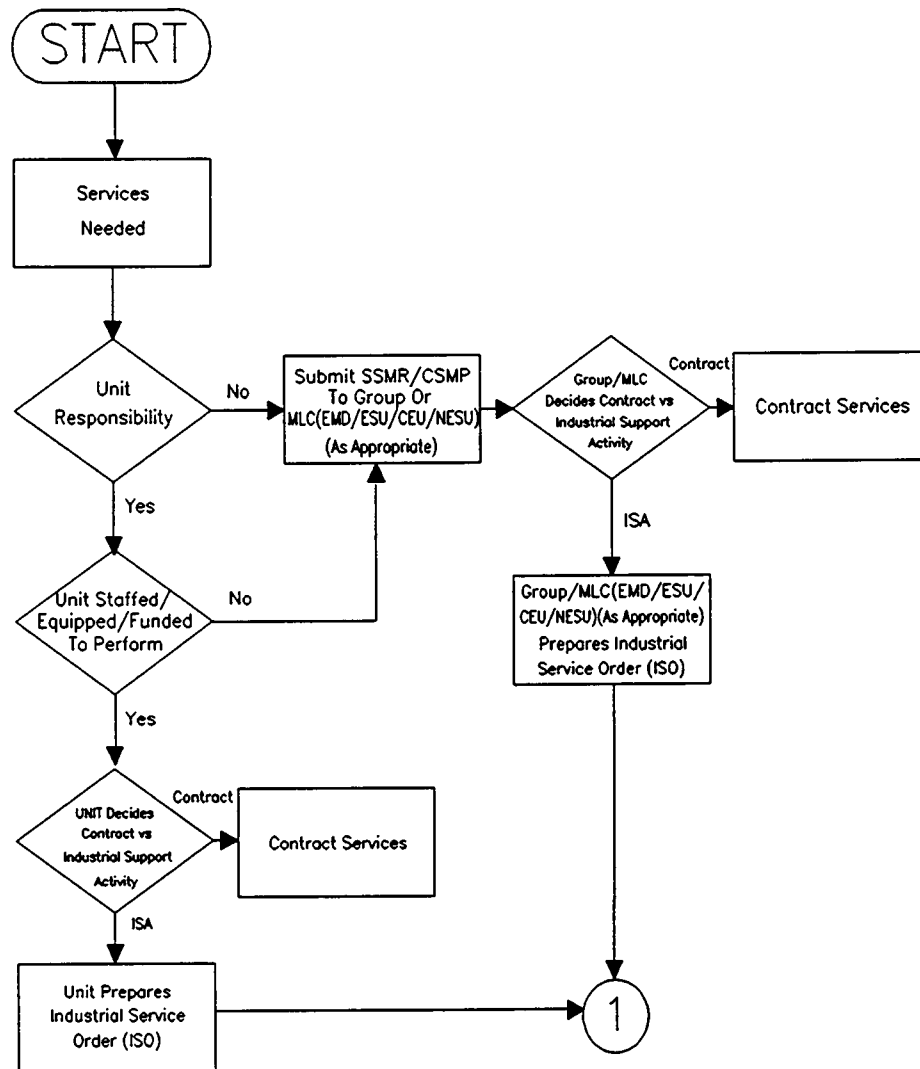
EXAMPLE: The ISO has a total funding limit set at \$500 for materials and a manhours limit of 20 hours. The ISO includes a general description of the types of services that might be requested and the per call limitations. Once the ISO is approved, the customer only needs to call the ISA and request service. The ISA keeps track of the individual requests charged to the ISO. The ISA makes sure they do not exceed the customer's funding limit. General, reoccurring tasks are typically completed under work orders. Continuous services may be funded on work orders by ISAs because of diverse and general requirements. Preparation for initial emergency responses are normally made on Work Orders and based on "Memorandums of Understanding" between the customer and the ISA.

- B. 1. a. Work Order Policy: The most notable difference between Work Orders and Project Orders (Project Orders are discussed later in this section) is the time limitation on availability of funds. Work Orders and their funds usually expire at the end of the current fiscal year. Any funds remaining with the ISO after the end of the fiscal year in which the funds expire are lost for use by either the customer or the ISA. At the beginning of the last quarter of the fiscal year in which the funds expire, the ISA should advise all Work Order Funding Units of their remaining balances and act to close-out or amend the Work Orders to maximize the use of funds.
2. Project Order Description. Unlike a Work Order, a Project Order is a request for **specific, definite, and certain** services. A Project Order is issued under authority of 14 U.S.C. 151 for "non-routine" manufacture of materials and/or equipment or for the performance of services. A Project Order is similar to a cost reimbursement contract placed with a commercial enterprise. For example: if a Cutter Engineer Officer (EO) needed an emergency generator overhauled, the unit could award a contract to a local marine machine shop for repairs. The cutter has the option of issuing an ISO to accomplish these repairs.
- a. Project Order Policy. To ensure integrity of the ISO system, specific Project Order guidelines are established, and must be strictly adhered to. Funds obligated for a Project Order do not necessarily expire at the end of the current fiscal year. The life of a project order shall not exceed more than two years (from the date opened to the date completed). Coast Guard Project Orders are:
- (1) Specific, definite, and certain orders placed for the manufacture of materials, supplies, or equipment or for other work or services to be completed within a specific time frame. Project Orders should normally include a delivery schedule and shipping instructions or provisions under which the items are delivered.
 - (2) Similar to a contract placed with a commercial enterprise and, to the same extent as a contract, will be specific, definite, and certain as to the work or services encompassed by the order.
 - (3) Issued for such purposes as production or construction.

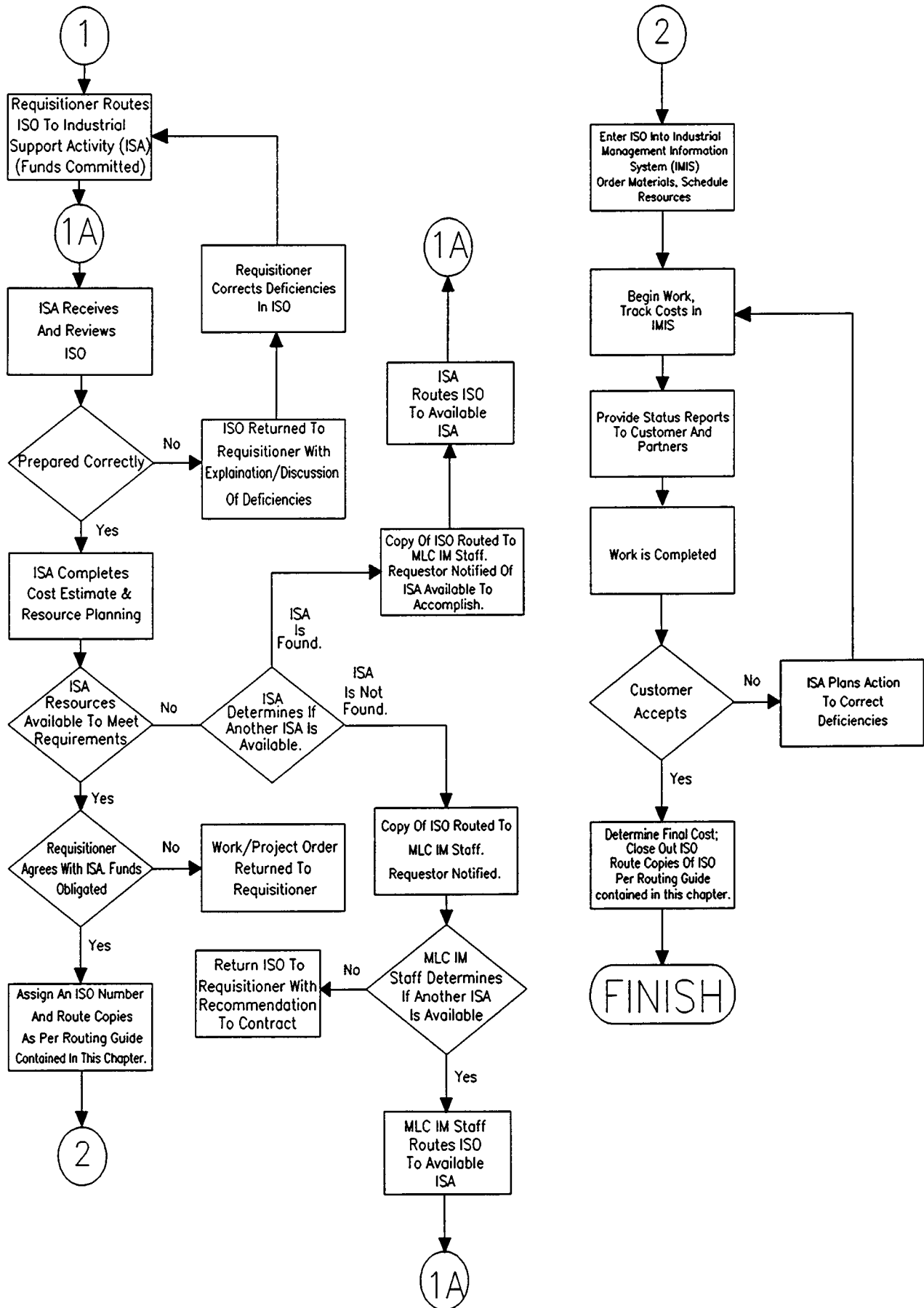
- B. 2. a. (4) Funded by any appropriation which can fund a contract.
- (5) Issued on an agreed price basis.
- (6) Fully funded from currently available funds.
- (7) Issued on the premise of bona fide need and the expeditious commencement/accomplishment of the requirements of the order. Project Orders will be constructively started in the fiscal year issued.
- (8) Not issued solely for the purpose of having the ISA perform contractual procurement or material requisitioning. ISAs must be in a position to manufacture the materials, supplies, and equipment or equipped to perform the bulk of the work or services ordered "in-house." Project Order funds may be used for purchases and contracting incidental to the execution of the order.
- (9) Not issued to fund the mission of an activity to avoid issuing an operating budget.
- (10) Not issued for the sole purpose of education, training, subsistence, storage, printing, laundry, welfare, transportation, travel, or communications.
- (11) Not issued for the primary purpose of continuing the availability of an appropriation beyond its normal expiration date.

C. Industrial Service Order Process.

1. Industrial Service Order Flow. The following flow charts outline steps for a customer to determine if an ISO is appropriate. They also contain the steps an ISA takes to accept and complete an ISO.



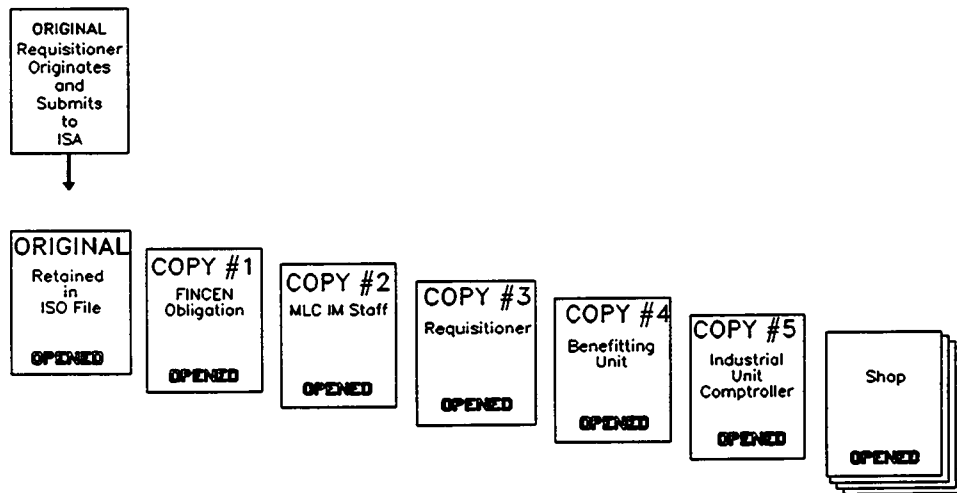
C. 1. (cont'd)



C. 2. Industrial Service Order Routing.

- a. When the requisitioner originates an ISO, it is responsible for the proper completion of all applicable sections of the form. The signed original is then routed to the servicing ISA.
- b. Once the Industrial Manager receives and approves the properly completed ISO, copies are routed to every partner in the ISO process. Local procedures may dictate alternate routing schemes, however, as a minimum, approved copies must be routed per the routing chart:

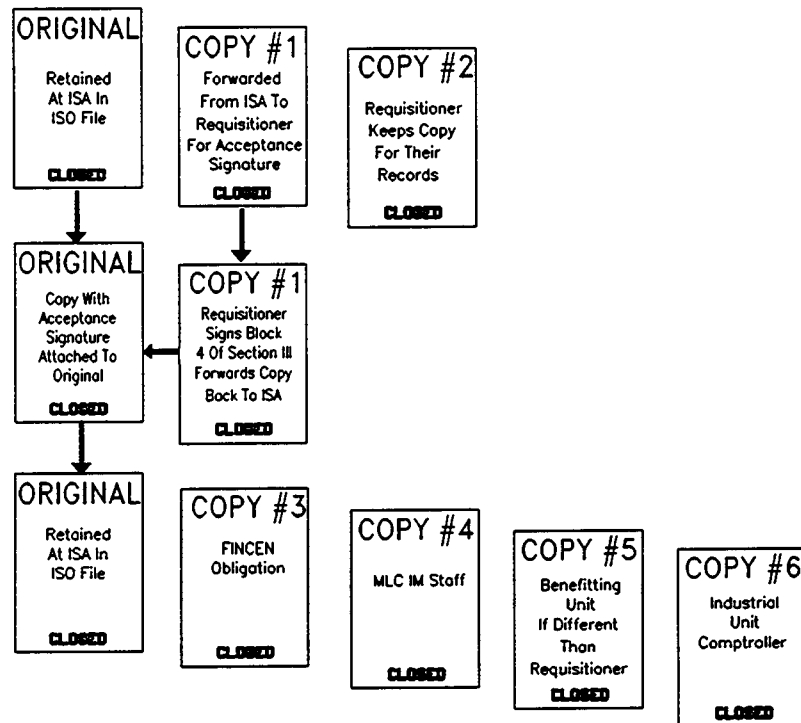
ROUTING CHART FOR INITIATING INDUSTRIAL SERVICE ORDERS



Note: Delete Copy #4 if the Benefitting unit is the same as the Requisitioner.

- c. Once all work/service is complete, the Industrial Manager takes steps to close out the ISO from the list of active orders.
- d. Local procedures may dictate alternate routing schemes, however, as a minimum, completion copies must be routed as indicated:

ROUTING CHART FOR CLOSING INDUSTRIAL SERVICE ORDERS



Note: Copy #1 is filed with the Original ISO.

- D. Industrial Service Order Form. The ISO form is part of the Coast Guard's standard forms library in Forms Plus and is in the Catalog of Forms.

DEPARTMENT OF TRANSPORTATION U.S. COAST GUARD CG 3103 (REV. 7-93)	<h2 style="margin: 0;">INDUSTRIAL SERVICE ORDER</h2>	ISO DOCUMENT NUMBER INDUSTRIAL ACCOUNT	PROJECT ORDER <input type="checkbox"/> WORK ORDER <input type="checkbox"/>
SECTION I. - FOR COMPLETION BY REQUISITIONER			
1. UNIT RECEIVING SERVICES OR PRODUCTS / OPFAC		2. DATE SERVICES REQUIRED	
3. DESCRIPTION OF WORK TO BE PERFORMED		4. ISO TITLE (Limited to 20 Characters)	
		5. CSMP/SSMR ATTACHED <input type="checkbox"/> YES <input type="checkbox"/> NO	
6. MATERIALS STATUS <input type="checkbox"/> ON BOARD <input type="checkbox"/> TO BE ORDERED BY _____ <input type="checkbox"/> ORDERED, DELIVERY BY _____		7. UNIT ASSISTANCE AVAILABLE	
8. ENCLOSURES/REFERENCES		9. UNIT INSPECTION REQUESTED <input type="checkbox"/> YES <input type="checkbox"/> NO	
10. REQUISITIONER (NAME/TITLE/PHONE NUMBER)	11. REQUISITIONING UNIT NAME/OPFAC	12. REQUISITIONER'S ESTIMATE	
13. FUNDING AUTHORIZATION TO COMMIT FUNDS	14. ACCOUNTING DATA	15. DATE AUTHORIZED	
SECTION II. - FOR INDUSTRIAL SUPPORT ACTIVITY USE ONLY			
1. COST BREAKDOWN		ESTIMATE	COST TO UNIT
a. DIRECT LABOR HOURS (Rows a, b and c are not charged to Coast Guard units)			
b. DIRECT LABOR COST			
c. OVERHEAD COST			
d. DIRECT LABOR OVERTIME HOURS			
e. DIRECT LABOR OVERTIME COST			
f. MATERIAL COST			
g. TRAVEL COST			
h. OTHER COST			
i. TOTAL COST			
2. EST START DATE	3. EST COMPLETION DATE	4. INDUSTRIAL ACTION <input type="checkbox"/> ACCEPT <input type="checkbox"/> REJECT (SEE COMMENTS)	This order is placed in accordance with provisions of 14 U.S.C. 151 or 31 U.S.C. 1535. Work to be performed and material to be procured pursuant by this order are properly chargeable to the appropriation or other accounts indicated. If the Requisitioner Estimate and the ISA Estimate differ, I certify the Requisitioner has been notified and agrees with obligating the ISA Estimated Amount.
5. WORK CATEGORY	6. OBLIGATION APPROVED BY		
		7. DATE APPROVED	
SECTION III. - ISO DISPOSITION			
1. COMMENTS		2. COMPLETED BY	3. DATE COMPLETED
		4. ACCEPTED BY	5. DATE ACCEPTED
		Detailed Cost Report Available Upon Request	

PREVIOUS EDITION IS OBSOLETE

Instructions for completing the ISO form are on page two of the form.

E. Industrial Service Order Instructions.

1. Glossary of Terms.

- a. Requisitioner. Unit responsible for obligating funds to complete the ISO. May also be the Benefiting Unit.
- b. Benefiting Unit. Unit which will benefit directly from services provided.

2. General Instructions. The below listed form items are mandatory, unless otherwise stated.

Top of form - Information filled in by the ISA after the ISO is received from the requisitioner.

- a. Industrial Service Order (ISO) Document Number. The ISA assigns this number. The number tracks each ISO within the Industrial Management Information System (IMIS) and documents the transaction within the Coast Guard's Large Unit Financial System (LUFS). The criteria for creating ISO Numbers is in the Funding Services Chapter, section A.4. of this manual.
- b. Industrial Account. The ISA assigns this account. It represents the ISA Program Element within LUFS that is credited by the obligation of the ISO.
- c. Project Order/Work Order. This block shows whether the ISO is a Project Order or a Work Order.

Section I - Information filled in by the Requisitioner prior to forwarding to the servicing ISA.

- d. Item 1 - Unit Receiving Services or Products/OPFAC. Official U.S. Coast Guard Long-Title and OPFAC of benefiting unit.
- e. Item 2 - Date Services Required. Date by which the requisitioner needs the service(s) accomplished.
- f. Item 3 - Description of Work to be Performed. Complete, detailed description of the tasks necessary to complete the requested service(s). Provide sufficient detail for ISA staff to prepare estimate and complete service(s) with little or no additional clarification.
- g. Item 4 - ISO Title. Provide a title that is unique and will easily identify this ISO; limited to 20 characters.

- E. 2. h. Item 5 - CSMP/SSMR Attached. Often a CSMP/SSMR can provide additional information, not found on the ISO, which could be helpful to an ISA. If the CSMP/SSMR does contain information which could be valuable to the Industrial Manager then it should be attached.
- i. Item 6 - Material Status. Tell the ISA of the status of materials to be provided by requesting/benefiting unit. If material is being provided, specific amounts and types of material are listed on an attached sheet.
- j. Item 7 - Unit Assistance Available. If unit assistance is available, describe the specific portions of work that will be completed by the unit. Include trades/ratings of personnel available.
- k. Item 8 - Enclosures/References. A listing of enclosures or attachments accompanying the ISO.
- l. Item 9 - Unit Inspection Requested. Notification by the requisitioner that the benefiting unit will be responsible for inspecting work in progress and completed Work.
- m. Item 10 - Requisitioner (Name/Phone Number). Representative of requisitioner available to answer specific questions about the work.
- n. Item 11 - Requisitioning Unit Name/OPFAC). Official U.S. Coast Guard Long-Title and OPFAC of requisitioning unit.
- o. Item 12 - Requisitioners Estimate. Total cost estimated by the requisitioner committed for accomplishment of the work to be performed.
- p. Item 13 - Funding Authorization To Commit Funds. Signature of individual authorized to commit requisitioner's funds.
- q. Item 14 - Unit Accounting Data. Requisitioner's accounting string.
- r. Item 15 - Date Approved. Date requisitioner authorizes funds committed for the ISO.

Section II - Information filled in by the ISA after the ISO is received from the requisitioner and the estimate is completed, and after the ISO is completed.

- E. 2. s. Item 1 - Cost Breakdown. Estimate - ISA's estimated cost breakdown for items (d) through (i) for the ISO. Actual - ISA's actual cost breakdown for items (a) through (i) for completed ISO. Cost to Unit - ISA's actual cost breakdown for items (d) through (i) for the completed ISO. These items are chargeable to the requisitioner.
- t. Item 1.a - Direct Labor Hours. Total Direct Labor Hours to complete the ISO. *
- u. Item 1.b - Direct Labor Cost. Total Direct Labor Cost to complete the ISO. *
- v. Item 1.c - Overhead Cost. Total cost to fund the ISA's overhead expenses incurred during completion of the ISO. *
- * **Cost to Unit:** These costs are not charged to Coast Guard Units, however they are charged to other government agencies that request services.
- w. Item 1.d - Direct Labor Overtime Hours. Total Direct Labor Overtime Hours to complete the ISO.
- x. Item 1.e - Direct Labor Overtime Cost. Total Direct Labor Overtime Cost to complete the ISO.
- y. Item 1.f - Material Cost. Total cost to fund direct materials necessary to complete the ISO.
- z. Item 1.g - Travel Cost. Travel costs to complete the ISO.
- aa. Item 1.h - Other Cost. Additional costs to complete the ISO.
- bb. Item 1.i - Total Cost). For the **Estimate Column** add items 1.e through 1.h (1.e+1.f+1.g+1.h) to indicate the amount obligated on the service order. For the **Actual Column** add items 1.b, 1.c, and 1.e through 1.h (1.b+1.c+1.e+1.f+ 1.g+1.h). For the **Cost to Unit Column** add items 1.e through 1.h (1.e+1.f+1.g+1.h) to indicate the amount billed to the requisitioner to complete the service order.
- cc. Item 2 - Estimated Start Date. Estimated date ISA will start work.
- dd. Item 3 - Estimated Completion Date. Date ISA will complete all services requested in block 3 (Description of Work to be Performed).
- ee. Item 4 - Industrial Action. Notification by the ISA that they will accept the ISO. Comments are required on rejected ISO's.

E. 2. ff. Item 5 - Work Category. Work is categorized as emergency or routine. Emergency services must be deemed by an operational commander to be completed quickly. A CASREP or a message stating the nature of emergency assistance required are attached to the ISO. Routine services are typically scheduled at the end of the current backlog but a higher priority may be given if the requisitioner and the Industrial Manager deem that the work needs to be completed earlier.

gg. Item 6 - Obligation Approved By. Industrial Manager's Signature signifying that the ISO has been accepted. If the requisitioner's estimate and the ISA's estimate differ, then the Industrial Manager certifies the requisitioner has been notified of the difference and the requisitioner agrees to obligating the ISA estimated amount.

hh. Item 7 - Date Approved. Date ISA accepts the ISO and approves the ISO.

Section III - ISO Disposition (Used by Requisitioner, Benefiting Unit, and ISA). Information is filled in by the Requisitioner, Benefiting Unit, and the ISA after the ISO is received from the requisitioner and the estimate is completed, or after the ISO is completed.

ii. Item 1 - Comments. Comments are required from the Industrial Manager whenever an ISO is rejected. Customers use this section to make comments at acceptance of services.

jj. Item 2 - Completed By. Signature of ISA representative authorized to report a complete ISO signifying that all work is finished and subject to inspection.

kk. Item 3 - Date Completed. Date ISO reported complete by an authorized representative of the ISA organization.

ll. Item 4 - Accepted By. Signature of the requisitioner (or a representative) accepting that the ISO is complete in accordance with the requirements under "Description of Work to be Performed."

mm. Item 5 - Date Accepted. Date the requisitioner accepts that the services have been performed satisfactorily.

F. Examples.

1. CASREP Example.

P 011100Z DEC 92
FM USCGC MORRO BAY
TO CCGDFIVE PORTSMOUTH VA//RE/OAN/OPC//
COMCOGARD MLC LANT NEW YORK NY//V/VR-1//
INFO COMLANTAREA COGARD NEW YORK NY//AOF//
COGARD SUPCEN BROOKLYN NY
COGARD SUPCEN CURTIS BAY MD
COMDT COGARD WASHINGTON DC//G-NIO//
COGARD NESU PORTSMOUTH VA
COGARD SUPRTCEN PORTSMOUTH VA
AIG SIX EIGHT FOUR THREE
ACCT CG-W2GERC
BT
UNCLASS VOL CCN VOL CCN
MSGID/CASREP/WTGB 106 MORRO BAY/300//
POSIT/CURTIS BAY MD/011100ZDEC92//
CASUALTY/INITIAL/92010/CDIE-NO. 1 MDE LUBE OIL
STRAINER HOUSING//
EIC:NONE/CAT:2//
AMPN/CRACKED WELD IS LEAKING LUBE AT APPROX. 1 QT.
PER HOUR.//
ESTIMATE/112000ZDEC92//
ASSIST/OTHER//
PARTSID/NONE//
RMKS/ REQ NESU PORTSMOUTH ARRANGE WITH SUPRTCEN
PORTSMOUTH INDUSTRIAL FOR EMERGENCY REPAIR OF CRACKED
WELD. FUNDS ARE AVAILABLE, NOT TO EXCEED \$200.00 AND
INDUSTRIAL IS AUTHORIZED TO PROCEED AS SOON AS VESSEL
IS MOORED AT SUPRTCEN PORTSMOUTH. IN ORDER TO AVERT
FAILED WELD AND OIL SPRAY, NO. 1 MDE WILL ONLY BE
USED IN AN EMERGENCY, OR DURING MANEUVERING AND
DOCKING.//
BT

2. Message Request.

P 011100Z DEC 92
FM COGARD LORSTA KURE
TO COGARD BASE HONOLULU HI
INFO CCGDFOURTEEN HONOLULU HI//OAN//
COGARD CEU HONOLULU HI
ACCT CG-W2GERC
BT
UNCLAS //N011014//
SUBJ: EMERGENCY ASSISTANCE
1. REQ BASE HONOLULU PROVIDE EMERGENCY TECHNICAL
ASSISTANCE TO ASSIST STATION PERSONNEL IN THE REPAIR
OF #2 REFER COMPRESSOR. FUNDS ARE AVAILABLE, NOT TO
EXCEED \$500.00 AND INDUSTRIAL IS AUTHORIZED TO
PROCEED.
BT

F. 3. Industrial Service Order - Work Order.

DEPARTMENT OF TRANSPORTATION U.S. COAST GUARD CG 3103 (REV. 7-93)	<h2 style="margin: 0;">INDUSTRIAL SERVICE ORDER</h2>	ISO DOCUMENT NUMBER 3193W10013921	PROJECT ORDER <div style="border: 1px solid black; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;"> </div>
INDUSTRIAL ACCOUNT 2/1/X03/4BN/38/0/JC/47000/2544		WORK ORDER <div style="border: 1px solid black; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;">X</div>	
SECTION I. - FOR COMPLETION BY REQUISITIONER			
1. UNIT RECEIVING SERVICES OR PRODUCTS / OPFAC		2. DATE SERVICES REQUIRED	
Base Honolulu / 47000		09/30/93	
3. DESCRIPTION OF WORK TO BE PERFORMED		4. ISO TITLE (Limited to 20 Characters)	
Provide Crane Service at Base Honolulu that can't be reasonably charged to another Industrial Service Order.		Crane Service	
		5. CSMP/SSMR ATTACHED	
		<input type="checkbox"/> YES <input checked="" type="checkbox"/> NO	
6. MATERIALS STATUS		7. UNIT ASSISTANCE AVAILABLE	
<input type="checkbox"/> ON BOARD <input type="checkbox"/> TO BE ORDERED BY _____ <input type="checkbox"/> ORDERED, DELIVERY BY _____		None	
8. ENCLOSURES/REFERENCES		9. UNIT INSPECTION REQUESTED	
None		<input checked="" type="checkbox"/> YES <input type="checkbox"/> NO	
10. REQUISITIONER (NAME/TITLE/PHONE NUMBER)		11. REQUISITIONING UNIT NAME/OPFAC	
I.E. Supervisor, 999-9999		Base Honolulu / 47000	
		12. REQUISITIONER'S ESTIMATE	
		2,000	
13. FUNDING AUTHORIZATION TO COMMIT FUNDS		14. ACCOUNTING DATA	
I.M. Manager		2/14/301/4BN/30/0/AH/47000/2571	
		15. DATE AUTHORIZED	
		10/01/92	
SECTION II. - FOR INDUSTRIAL SUPPORT ACTIVITY USE ONLY			
1. COST BREAKDOWN		ESTIMATE	ACTUAL
a. DIRECT LABOR HOURS (Rows a, b and c are not charged to Coast Guard units)			1,500.00
b. DIRECT LABOR COST			22,500.00
c. OVERHEAD COST			22,500.00
d. DIRECT LABOR OVERTIME HOURS		0	0
e. DIRECT LABOR OVERTIME COST		0	0
f. MATERIAL COST		2,000.00	1,923.00
g. TRAVEL COST		0	0
h. OTHER COST		0	0
i. TOTAL COST		2,000.00	46,923.00
2. EST START DATE	3. EST COMPLETION DATE	4. INDUSTRIAL ACTION	
10/01/92	09/30/93	<input checked="" type="checkbox"/> ACCEPT <input type="checkbox"/> REJECT (SEE COMMENTS)	
This order is placed in accordance with provisions of 14 U.S.C. 151 or 31 U.S.C. 1535. Work to be performed and material to be procured pursuant by this order are properly chargeable to the appropriation or other accounts indicated.			
5. WORK CATEGORY	6. OBLIGATION APPROVED BY		7. DATE APPROVED
Routine	I. M. Manager		10/01/92
If the Requisitioner Estimate and the ISA Estimate differ, I certify the Requisitioner has been notified and agrees with obligating the ISA Estimated Amount.			
SECTION III. - ISO DISPOSITION			
1. COMMENTS		2. COMPLETED BY	3. DATE COMPLETED
		I.E. Supervisor	09/30/93
		4. ACCEPTED BY	5. DATE ACCEPTED
		I.M. Manager	09/30/93
		Detailed Cost Report Available Upon Request	

PREVIOUS EDITION IS OBSOLETE

F. 4. Industrial Service Order - Project Order.

DEPARTMENT OF TRANSPORTATION U.S. COAST GUARD CG 3103 (REV. 7-93)	<h2 style="margin: 0;">INDUSTRIAL SERVICE ORDER</h2>	ISC DOCUMENT NUMBER 3193P60013921 INDUSTRIAL ACCOUNT 2/1/X03/4BN/38/0/JC/47000/2544	PROJECT ORDER <input checked="" type="checkbox"/> WORK ORDER <input type="checkbox"/>
SECTION I. - FOR COMPLETION BY REQUISITIONER			
1. UNIT RECEIVING SERVICES OR PRODUCTS / OFFAC STA Little Creek/30277		2. DATE SERVICES REQUIRED 02/15/93	
3. DESCRIPTION OF WORK TO BE PERFORMED		4. ISO TITLE (Limited to 20 Characters) Renovate Crews Qtrs	
Remove existing panelling from crews quarters and install new panelling. Install new mouldings.			
		5. CSMP/SSMR ATTACHED <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO	
6. MATERIALS STATUS <input type="checkbox"/> ON BOARD <input type="checkbox"/> TO BE ORDERED BY _____ <input type="checkbox"/> ORDERED, DELIVERY BY _____		7. UNIT ASSISTANCE AVAILABLE None	
8. ENCLOSURES/REFERENCES Drawing 567050		9. UNIT INSPECTION REQUESTED <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO	
10. REQUISITIONER (NAME/TITLE/PHONE NUMBER) I. M. SMITH, XO, 999-9999	11. REQUISITIONING UNIT NAME/OFFAC CEU Cleveland/51282		12. REQUISITIONER'S ESTIMATE 1500.00
13. FUNDING AUTHORIZATION TO COMMIT FUNDS I. M. SMITH	14. ACCOUNTING DATA 2/32/301/132/43/0/AH/30277/2544		15. DATE AUTHORIZED 11/01/92
SECTION II. - FOR INDUSTRIAL SUPPORT ACTIVITY USE ONLY			
1. COST BREAKDOWN		ESTIMATE	COST TO UNIT
a. DIRECT LABOR HOURS (Rows a, b and c are not charged to Coast Guard)			0
b. DIRECT LABOR COST		4800.00	0
c. OVERHEAD COST (units)		4800.00	0
d. DIRECT LABOR OVERTIME HOURS		0	0
e. DIRECT LABOR OVERTIME COST		0	0
f. MATERIAL COST		1500.00	1400.00
g. TRAVEL COST		0	0
h. OTHER COST		0	0
i. TOTAL COST		1500.00	1400.00
2. EST START DATE 01/15/93	3. EST COMPLETION DATE 02/01/93	4. INDUSTRIAL ACTION <input checked="" type="checkbox"/> ACCEPT <input type="checkbox"/> REJECT (SEE COMMENTS)	
5. WORK CATEGORY Routine		6. OBLIGATION APPROVED BY I. M. Manager	
		7. DATE APPROVED 11/10/92	
SECTION III. - ISO DISPOSITION			
1. COMMENTS		2. COMPLETED BY I. F. Carpenter	3. DATE COMPLETED 02/05/93
		4. ACCEPTED BY I. M. OIC	5. DATE ACCEPTED 02/05/93
		Detailed Cost Report Available Upon Request	

PREVIOUS EDITION IS OBSOLETE

CHAPTER 3

FUNDING SERVICES

Contents

- A. Industrial Support Activity Revolving Fund
 - B. Industrial Service Order Transaction Flow
 - C. Funding Flow
-

A. Industrial Support Activity Revolving Fund.

1. Statutory Authority. The authority for an ISA to perform reimbursable work is an accepted industrial service order (ISO).
2. Administration and Control. Commandant (G-ES) is responsible for the oversight and management of the Coast Guard ISA Revolving Fund. The Commanding Officers of units designated as Industrial Support Activities are responsible for the administration, control, and accountability of their individual program element.
3. Industrial Service Order. Any Coast Guard unit or staff, with authority for obligating government funds can request services from an ISA. The authority for an ISA to perform an ISO is the Reimbursable Economy Act Order (Industrial Work Order) or the Interagency Project Order (Industrial Project Order). Economy Act orders are valid through completion of work, or until the ordering appropriation expires, whichever occurs first (as referenced in Principles of Federal Appropriations Law 6-16 through 6-21). Interagency Project Orders are valid through completion of the work in the same manner as funds cited in contracts or orders placed with commercial enterprises. However, the life of Coast Guard Industrial Project Orders will not exceed more than two years from the date opened. Funds so designated remain available for completion regardless of the date the funds cited on the orders expire for obligation purposes (as referenced in Principles of Federal Appropriations Law 7-27). A customer's funds are obligated once an ISO for services is approved by an ISA. This is much the same as obligating funds in any commercial procurement. Refer to the Requesting Services Chapter for further information on ISO funding requirements and restrictions. The ISO contains information that is used in the data fields of the job cost accounting system. Refer to page 2-10 for an example of an ISO. The data elements are as follows:

A. 4. Industrial Service Order Document Number. The ISA assigns this number. The number tracks each ISO within the Industrial Management Information System (IMIS) and documents the transaction within the Coast Guard's Large Unit Financial System (LUFS).

a. The ISO Number is an abbreviated 9 character alphanumeric portion of the ISO Document Number.

EXAMPLE: P60013921

HOW TO CREATE AN ISO NUMBER:

1st digit ISO#.. - P = Project Order
W = Work Order

2nd digit ISO#.. - Funding Source
1 = AFC 30 Aids to Navigation
2 = AFC 30 Electronics
3 = AFC 30 Naval
4 = AFC 30 Civil
5 = AFC 42
6 = AFC 43
7 = AFC 45
8 = AFC 80 and AFC 00 (AC&I)

3rd thru 5th.... - Sequential Id Number (001-999)
digit ISO#

6th digit ISO#.. - Last digit of the fiscal year

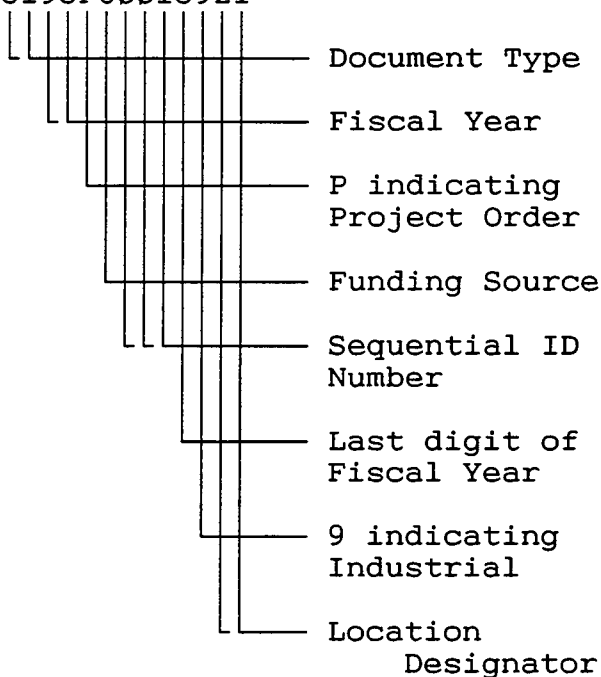
7th digit ISO#.. - Designates Industrial
9 = Industrial

8th and 9th..... - Location Designator
digit ISO#
21 = SUPRTCEN Boston, MA
22 = Base South Portland, ME
23 = Base South West Harbor, ME
24 = Group Woods Hole, MA
25 = Base St. Louis, MO
26 = SUPRTCEN New York, NY
27 = SUPRTCEN Portsmouth, VA
28 = Base Miami, FL
29 = Base Charleston, SC
30 = Base San Juan, PR
31 = Base Mayport, FL
32 = SUPRTCEN New Orleans, LA
33 = Base Ft. Macon, NC
34 = Base Mobile, AL
35 = Base Detroit, MI
36 = Base Milwaukee, WI
37 = Base Sault Ste Marie, MI
38 = SUPRTCEN Alameda, CA
39 = SUPRTCEN San Pedro, CA

40 = Group Baltimore, MD
 41 = Base Honolulu, HA
 42 = Base Ketchikan, AL

- A. 4. b. The ISO Document Number is the 13 digit accounting document number used in LUFS and DAFIS.

EXAMPLE: 3193P60013921

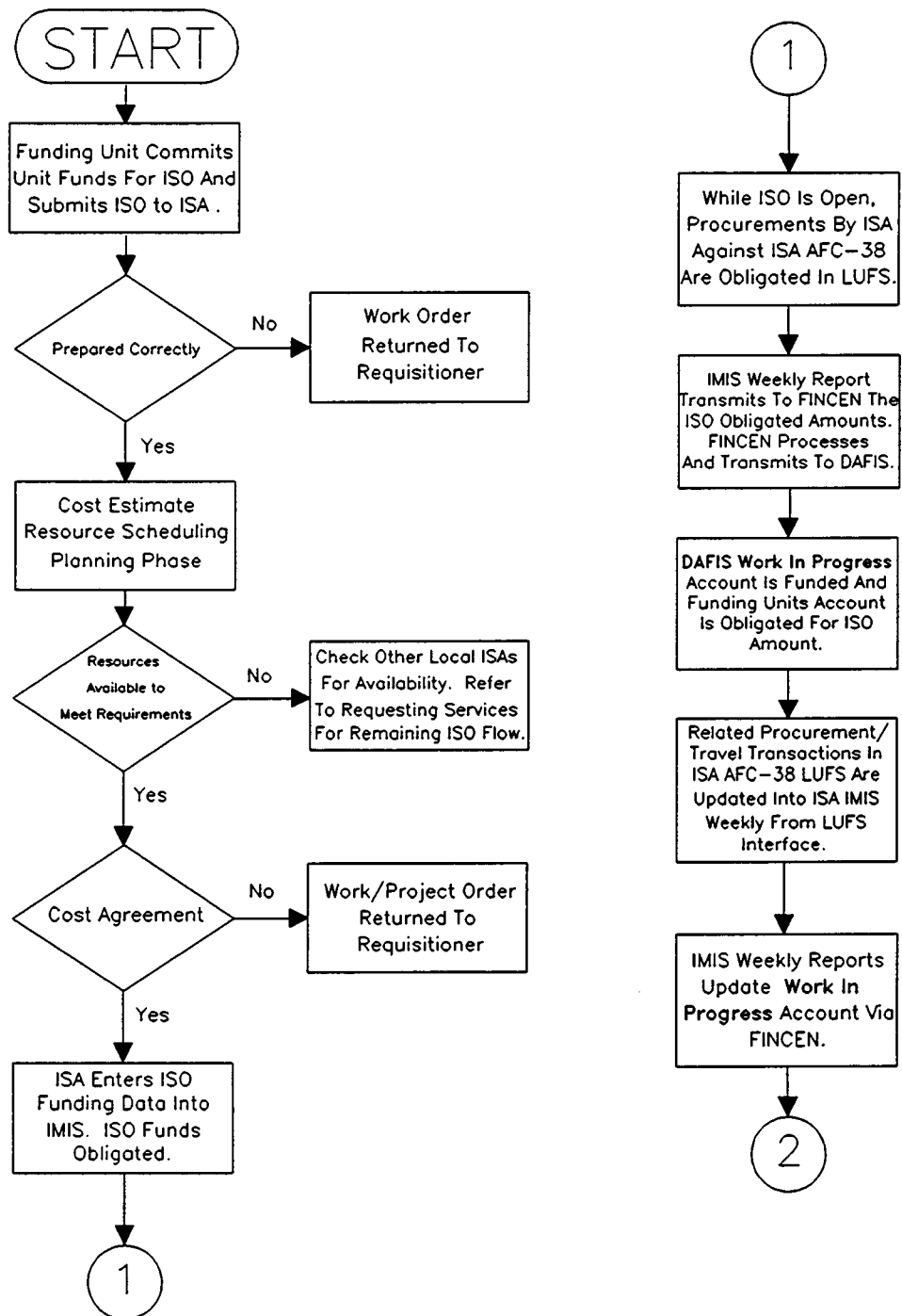


- B. Industrial Service Order Transaction Flow. The industrial revolving fund utilizes AFC-38 to record transactions in the Coast Guard's accounting system. The flow charts on pages 3-5 and 3-6 depict the transaction flow for a single ISO transaction:

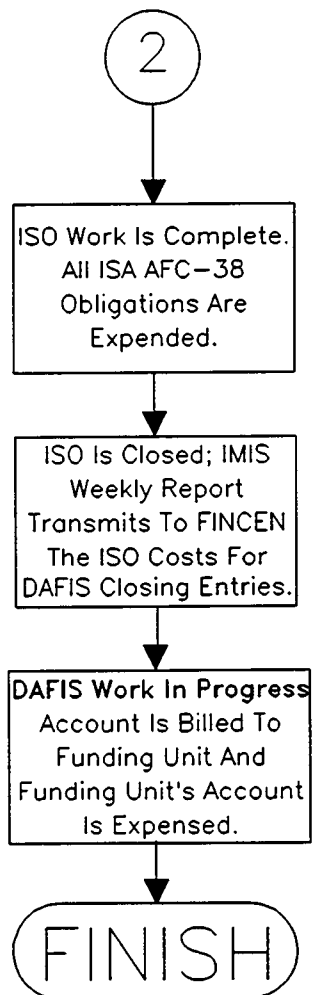
1. Transaction Flow Explanation. An ISO is treated just like other purchase transactions for the Funding Unit. The Funding Unit first enters the transaction into LUFS as a commitment. After the ISA agrees with the Funding Unit on the amount, the transaction will appear on the unit's PES Report indicating an obligation for the agreed upon amount. This is accomplished via the ISA's FINCEN status report that is sent to the FINCEN on a weekly basis. When the ISO is complete the Funding Unit will see an expenditure on its PES Report for the service orders final cost. ISAs must consult with the Funding Unit and must obtain prior approval of an amendment to the original service order, if the original obligation will be exceeded by 10%.

B. 2.

TRANSACTION FLOW CHART



B. 2.



C. Funding Flow. All service order transactions occur in the industrial support activities AFC-38 account (Refer to the Funding Flow Chart on page 3-7). The following information is to be used in conjunction with the Funding Flow Chart to provide further explanation of the process:

1. The weekly FINCEN report generated by the ISA provides information required by FINCEN. This information is processed and data is provided to DAFIS. This ultimately results in an obligation to the Funding Unit. The DAFIS Work In Progress account and the ISA's AFC-38 account are funded for the ISO amount.
2. The ISA uses the AFC-38 account for ISO procurements and travel. These transactions are recorded in the ISA's LUFS.
3. Once a week information from the ISA's LUFS, is processed into the ISA's IMIS. As documents are expensed in LUFS and recorded in IMIS, information is sent to the FINCEN in the weekly FINCEN Report. The DAFIS Work In Progress account is updated from the FINCEN Report.
4. When a service order is complete and all procurements in support of that order are expensed, the ISO is closed after reconciliation with the ISA's LUFS. Reconciliation is accomplished by comparing the LUFS information (Project Summary Report) with the postings contained in IMIS (FINCEN Report). Closing of the service order will be indicated in the next weekly FINCEN Report and allow for final billing of the Work In Progress account, expenditure for the funding units account, and adjustment to the ISO's AFC-38 account.

C. 4. (cont'd)

FUNDING FLOW CHART

